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ABSTRACT

Sixteen New Jersey school districts located in four counties were selected to field test a generic educational planning system. The pilot program was to "ascertain where changes in guidelines, procedures, policy program, or resources were needed." The second major goal of the pilot program was to produce information for those districts without significant planning experience. This report examines the execution of the pilot program at all levels from the State Department of Education to the local field test districts. Using the roles assigned to the various participants, actual performance information, and the field test goals, the report attempts to establish how well the field test succeeded and what impact it is likely to have on statewide implementation of educational planning. Interviews were conducted with those persons having primary field test responsibility focused on matters of planning preparation, training, resources allocation and use, decision methods, oversight, community participation, coordination, participant attitudes, and eventual planning product. (Author/MLF)

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Occasional Papers in Education

NEW JERSEY STATE DEPARTMENT OF EDUCATION

DIVISION OF RESEARCH, PLANNING AND EVALUATION

T & E PILOT DISTRICT

FIELD TEST REPORT

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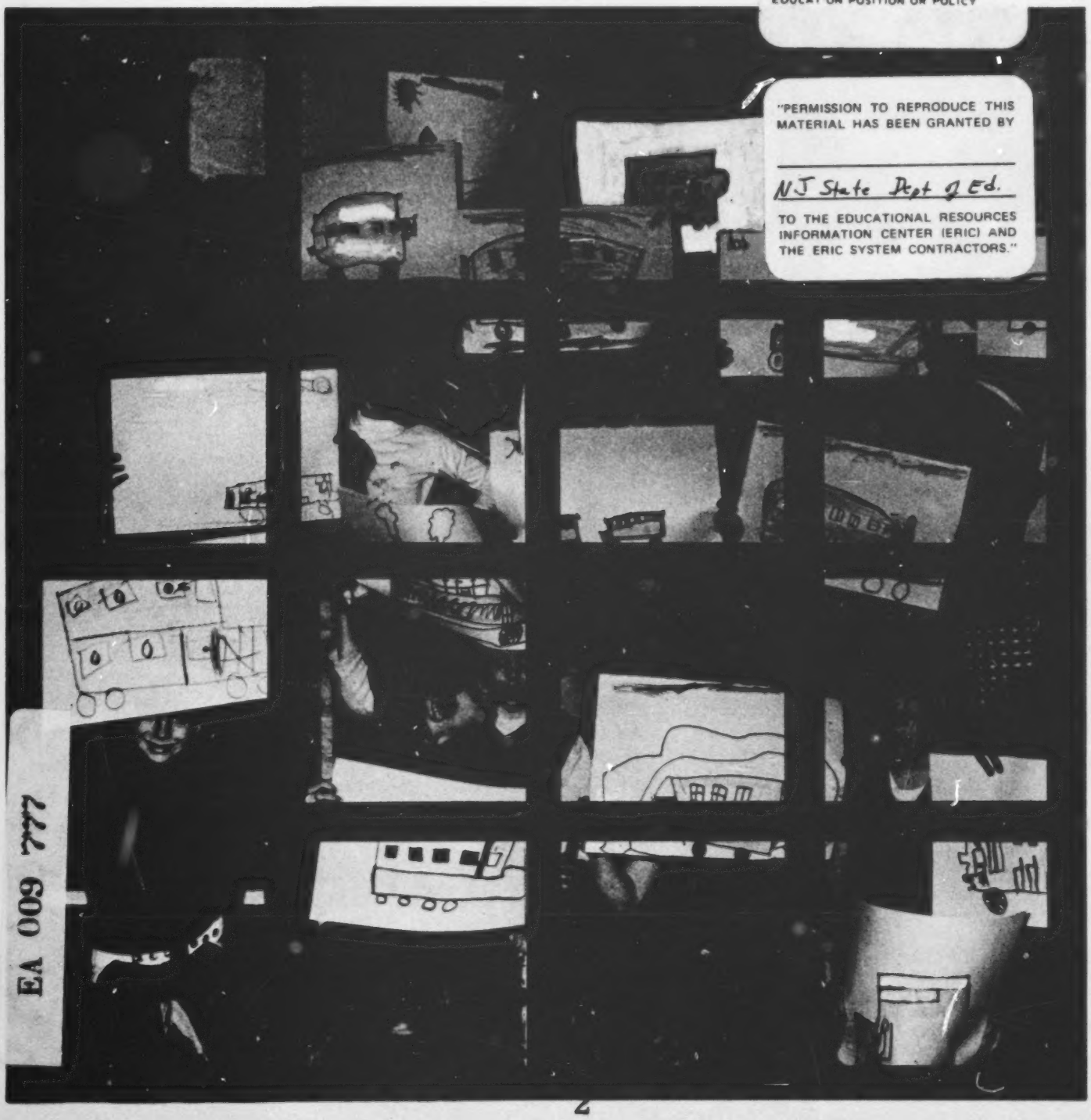

EA 009 777

T & E PILOT DISTRICT

FIELD TEST REPORT

A Report Presented At
The AERA 1977 Annual Meeting
New York, New York
April 4-8, 1977

Presented By
William A. Volk
Director of Planning
Research, Planning and Evaluation

T & E

PILOT DISTRICT

FIELD TEST REPORT

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DIVISION OF RESEARCH, PLANNING AND EVALUATION

March 1, 1977

Herewith are the results of a series of interviews conducted for the purpose of augmenting the evaluation of sixteen school districts in New Jersey. The districts were evaluated on management processes related to the implementation of a thorough and efficient (T & E) educational system as prescribed in the Public Education Act of 1975.

Included in the field test were two intermediate units, the county offices of which there were four and the Educational Improvement Centers (EICs) of which there were two. The county office as a unit was designed to monitor the activities of the districts. Ultimately, it was anticipated that their role would become one of interpreting the law as well as one of assaying the progress of districts in meeting the requirements of the law. In that respect, the county superintendent represents the Commissioner of Education in the field development of a thorough and efficient educational system. The EICs on the other hand are designed to provide technical assistance to the districts as they implement the law. The EICs are expected to serve at the discretion of the districts. The complete intermediate unit structure of New Jersey includes twenty-one counties and four EICs.

The principal investigators for this report were Dr. Gerald E. Sullivan and Debbie Amper, both of whom, at the time of the investigation, were associated with the Eagleton Institute of Politics, Rutgers, The State University. The investigation took place during the summer of 1976.

An executive summary of the results is as follows:

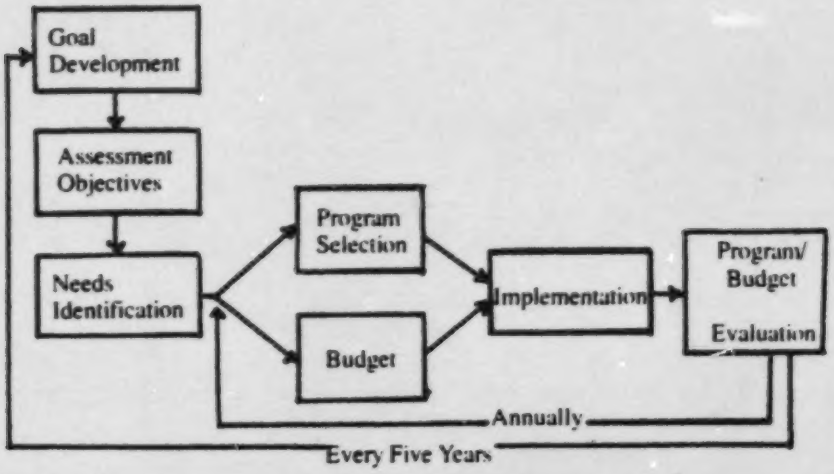
The field test report was organized by the principal investigators into eight sections as listed:

Introduction
Characteristics of the Field Test
The Field Test Participants
Goal Development
Needs Assessment, Program Improvement and Program Evaluation
The Counties
Educational Improvement Centers
Recommendations

Introduction:

Sixteen districts located in four counties and serviced by two EICs were selected to field test a generic educational planning system. The field test was intended (1) to test a generic planning system and (2) to be a future source of information to other districts lacking planning experiences. The major areas of the generic planning system were identified as follows:

General Planning Model



CONCERNS TO BE CONSIDERED IN EACH STEP

1. Context
2. Communications
3. Involvement
4. Priorities
5. Data Needs
6. Management Process
7. Evaluation

Characteristics Of The Field Test:

The field test was designed and administered by the Research, Planning and Evaluation Division (RPE) of the State Department of Education. All field test participants were volunteers. Only general provisions were set by RPE. Decisions concerning procedures and standards were left to the discretion of local or county personnel. This leeway can be attributed to a conscious policy decision of the Commissioner of Education, that is, to leave much of the planning content and process to the local officials. Local autonomy has historically been a cherished right within the educational system of New Jersey; under T & E it would be preserved.

The absence of standards and central control played a major part in the field test program. Without central standards and with local discretion only, the influence of county and EIC personnel could work to keep the activities of pilot districts consistent with one another.

The Field Test Participants:

For the purpose of this study, field test districts were divided into two groups by the investigators. The groups included: (1) districts which entered into the goal development planning stage; and, (2) districts which were assigned to one of three other planning stages, i.e., assessment, program selection, or evaluation.

Goal Development:

Five northern and five southern districts were assigned to goal development. In each district the focal person for all district planning activities was the T & E Coordinator. In approximately half of the districts, the superintendent assumed the role of T & E Coordinator. In the other half, the superintendent appointed the T & E Coordinator from the district's administrative staff. Coordinators reported that T & E goal development activities took between 25% and 50% of their time.

Districts in goal development were those districts lacking significant planning experience. The T & E Coordinators were not given specific information. Many districts chose the least complex and most manageable of the planning tasks, namely, creation of a set of goal statements.

One of the primary requirements of the Public School Education Act of 1975 is that of making educational planning a community process. Many of the pilot districts experienced very real problems in simply identifying the community and defining what role it would play in the activities of the district. Each of the goal-development sites, however, had some form of community participation.

Although the method of goal development varied from district to district there were two main approaches used. These may be labeled as direct and indirect. In the direct method, some persons from the community participated in goal development; in the indirect method, few numbers of community were involved. Regardless of how many participated, the field test districts used closed (packaged) or open (less structured) systems. Most of the goal development sites used the closed system; five field test districts opted for the goal development package marketed by Phi Delta Kappa (PDK). Expediency was a prime factor in a district's selection of the PDK model.

Many of the districts accomplished nothing beyond basic goal-development. In some districts the community selected general goals, and the instructional staff translated the goals into operational language for the classroom. This was a difficult task. Furthermore, the state guidelines were predicated upon the idea of sequential planning. A sequential approach to educational planning wherein stages are analytically separated from one another and then are developed in sequential order, caused serious problems.

At every site, the community goal development process was under the control of district school administrators. The fact that products of planning affected the district status quo so little and penetrated only slightly into the internal operations of the district administration was not accidental. Goals were selected without regard for how schools would function to achieve them. Few administrators expected the goals to have a significant impact on the local educational system.

The goal development processes of the field test demonstrated that districts could meet the planning requirements. It also demonstrated that educational planning is far more complex and difficult than anticipated. Although every district had some form of community involvement, that involvement played little or no role in determining process governance or in other aspects of educational planning.

Needs Assessment, Program Improvement and Program Evaluation:

Most of the districts selected for the second stage of the planning system had on-going programs matching a particular planning phase of the generic model. Thus, it was not at all clear exactly what, if anything, was being field tested. Some districts were selected to be advanced-phase field sites because they held grants and/or special projects; and, the objectives of these projects or grants defined the scope of efforts. In other cases districts simply chose to confine their activities to those projects and utilized them as their field test emphasis. The field test of the needs assessment, for example, clarified almost nothing about the workings of that phase of planning. Furthermore, the basic reference document, Comprehensive Planning in the Local District was not altogether clear on what a needs assessment was or how it should be carried out.

Overall, the field test districts in the latter phases of educational planning presented a barren picture. Some districts accomplished nothing concrete; others did little or nothing that they had not been doing previously. Only a few made a real effort to place activities in the context of the generic planning structure.

The Counties:

Under the decentralization plan adopted by the Commissioner of Education, county superintendents were given greater and more inclusive operational responsibilities for the districts in their counties. The state delivery system for T & E assumed that the county offices would have the human and material resources for carrying out all of their functions, including monitoring of local planning efforts. Each county office, lacking trained personnel, was not totally capable of fulfilling the expected role and had to manage as best as possible.

In the future, county monitoring could play a significant role; county staff could enhance district performance by clearly communicating expected performance standards to districts and they could insure that standards are properly understood. The county office could take an active part in monitoring district activities.

The state model based on monitoring by county office personnel appears workable. Districts accepted the county role and perceived the need for monitoirng. There remained a need for staffing and training of the county office personnel.

Educational Improvement Centers:

Overall the two EICs were the most impressive parts of the field test. The EICs approached educational planning in a similar manner: each perceived the assistance problem as a matter of process training. The EICs demonstrated an ability to provide needed services. Their role of providing technical assistance was not a new role. The two EICs had been in operation for a number of years prior to the field test. The EICs had experienced staffs to cope with the problems of the local schools in implementing T & E.

Recommendations:

1. The field test should be continued. Because the latter three planning stages were not field tested, the ten goal development pilots should perform this role. They should advance into the next stage, one year at a time, staying a stage ahead of districts statewide and providing meaningful operational information to those districts. Operational responsibility for this continued field test should be vested at the state level.

2. Planning guidelines should be rewritten and expanded. Especially in the needs assessment and program improvement stages, planning guidelines should detail specific planning activities and provide concrete examples of the procedures to be employed. These revised guidelines should be subjected to rigorous examination in the expanded field test.

3. Considerable effort should be made to insure that the goal development stage is made integral to the entire planning effort. Procedures should be developed to link the three phases of goal development, to insure community participation at each phase, and to assure that later planning stages are directly connected to the goal development stage.

4. County personnel should be trained in planning monitoring. Intensive training sessions should be held for all members of county staff for the purpose of explaining their role to them and to detail what will be expected of them in their monitoring roles.

5. All EICs should begin an immediate district outreach program. EICs should be held responsible for contacting each district in their region at least monthly and for keeping detailed records of these contacts.

6. SDOE personnel should periodically visit districts in the process of educational planning to familiarize themselves with field problems and to evaluate County and EIC efforts.

Conclusion:

In moving through the T & E process, even though it may have presented administrative and other inconveniences for some, T & E was implemented in the New Jersey schools. What is more, districts and counties believe that the T & E approach makes sense; that it will mark the road to educational excellence; that it will help schools better express accountability; and that the process has potential for beneficial effects on children.

T & E

PILOT DISTRICT

FIELD TEST REPORT

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INTRODUCTION

In its continuing efforts to provide a thorough and efficient (T & E) education for all children in the State, the Division of Research Planning and Evaluation conducted a T & E field test of sixteen school districts in order to facilitate implementation of the planning process for school improvement. The Eagleton Institute of Politics of Rutgers, the State University, extended the evaluation of the districts through an interview process. The process was concerned primarily with the trials and tribulations encountered by districts in their management of the T & E planning process. The study provided recommendations for changes in policy, procedures and utilization of resources. The intent of this report is to identify performance patterns of field test participants for the purpose of providing information to districts that would, in the near future, encounter similar problems as they attempt to implement the T & E planning process.

Sincerely,

Gary Gappert

Gary Gappert
Assistant Commissioner
Research, Planning and Evaluation

Introduction

In September, 1975, the legislature passed the Public School Education Act. Potentially at least, the act had revolutionary significance. From this point, a "thorough and efficient system of free public schools", the foundation of the act in the state constitution, would mean a goal-based, management approach to educational administration. The act required every local board of education to adopt district educational goals and to use them as standards for decision-making. The break with past procedure was clear and decisive.

However, the act was general in nature and left procedures for establishing goals to the State Board of Education. Three months after passage of the act, the State Board of Education adopted implementing regulations. They directed each local school district in New Jersey to construct educational plans containing broad statements of purpose, coupled with more specific educational objectives. To this basis was to be added assessments of local needs based upon the objectives, programs for meeting identified needs, and methods for evaluating program success. By these regulations, school governance was to be rationalized; problems were to be defined and resolved in a systematic way, and management was to be directed to the improvement of educational performance.

For all the rhetoric, the real test lay ahead in the implementation of the regulations. And the picture was not all that bright. The first and most basic impediment to progress was the fact that few local districts in the state were prepared to execute the educational planning task outlined in the regulations. Most simply had no planning experience, and the small number of districts with substantial planning experience had not utilized a comprehensive planning model similar to that developed by the State Department of Education. Compounding this first problem was the fact that the administrative planning model had not been organizationally tested. Fundamentally new roles had been assigned to administrative personnel at the regional, county, and local levels. No one knew how the system would work in practice.

For these reasons it was decided to field test the planning system prior to full statewide implementation. In this way, many of the procedural, administrative, and substantive problems inevitably arising in a new and innovative program could be addressed and resolved in a controlled setting without creating undue, widespread confusion. Then, after the field test was completed, the remaining local districts could begin planning using an operationally tested and workable system.

Sixteen districts located in a total of four counties were selected to pilot the educational planning system. The Research, Planning and Evaluation Division (RP and E) of the Department of Education prepared planning guidelines treating each of the four analytical planning stages in detail. In accordance with its past planning experience and present resources, each pilot district was assigned to field test one planning stage. Those districts without planning experience were all assigned to the initial stage of planning, goal development; the remaining districts were assigned to one of the other stages. Ten pilot districts were assigned to field test goal development, two were assigned to test needs assessment, two to program improvement, and the final two pilot districts were assigned to field test the evaluation component.

Excepting the limited number of participants and restriction of districts to only one planning stage, the pilot program was intended to duplicate the planning system as it would be implemented statewide. Accordingly, the four participating county superintendents were given the expanded responsibility of monitoring pilot district performance and of advising them with respect to the progress of their planning efforts. Each of the two Educational Improvement Centers (EICs)

were given the additional responsibility to provide technical assistance of both a process and substantive type on a continuing basis. Each EIC was made responsible for the pilot districts of two counties: EIC-NW was given responsibility for Morris and Middlesex Counties, and EIC-S was given responsibility for Camden and Gloucester counties. Further, the State Department of Education was to establish and direct the pilot program, supply planning materials to the participants, resolve problems of interpretation, coordinate the overall efforts of the agencies involved, and assess the final results of the field test.

Just what was the field test expected to accomplish? Simply put, the program had two major goals. In the first place it was to serve as a field test for the entire educational planning system. Using optimality in district implementation, EIC assistance, and county monitoring as comparative standards, the pilot program was to "ascertain where changes in guidelines, procedures, policy program or resources were needed". This track aimed at seeing what worked and making changes in those parts that did not function properly. The second major goal of the pilot program was to produce information for those districts without significant planning experience. By gathering and disseminating information about how the pilot districts went about their tasks, the field test aimed at facilitating the efforts of remaining districts. Knowledge of what had been accomplished by the pilots could serve as a model for those districts.

These are straightforward goals, and they can be used to assess the field test. This report will examine the execution of the pilot program at all levels from the State Department of Education to the local field test districts themselves. Using the roles assigned to the various participants, actual performance information, and the field test goals, the report will attempt to establish how well the field test succeeded and what impact it is likely to have on statewide implementation of educational planning.

To answer these questions, the summer of 1976 was spent carefully building a composite picture of the field test program. It began by interviewing personnel of Research, Planning and Evaluation who were responsible for the field test and by attending conferences with the field test participants. Next, all available materials at Research, Planning and Evaluation were reviewed and the final summary reports of the pilot districts, county superintendents, and the EICs were studied. Following this initial preparation, each pilot district (except the Morris County Voc-Tech.), the four county offices, and the two EICs were visited. During these visits intensive interviews were conducted with those persons having primary field test responsibility. Generally, the questions were directed at obtaining a clear and full account of what went on in the organization during the fied test period. Specifically, the questions focused on matters of planning preparation, training, resources allocation and use, decision methods, oversight, community participation, coordination, participant attitudes, and eventual planning product. While this may not have been the best possible information gathering method (clearly, it would have been best to directly observe while the field test was in progress), it was felt that the interviews produced candid and accurate portrayals of field test activities in each location. These interviews, as supplemented by reports and other materials, served as the basis for an analysis of the field test.

Characteristics of the Field Test

The field test was designed and administered by the Division of Research, Planning and Evaluation of the State Department of Education. Goals promulgated by the Division for the field test emphasized two purposes: identification of optimal performance patterns by each administrative level of participant and use of field test performance information for non-participants. The first goal

centered on a test of the administrative planning system developed by Research, Planning and Evaluation, while the second was intended to provide tested procedures which non-participants could use to model their own planning activities.

To some extent, however, execution of the field test mitigated against achievement of these goals. In the first place, selection of field test participants was heavily skewed in favor of suburban and rural school districts and against urban school districts. Of the 16 pilot districts, only New Brunswick with its 30,000 population could rightfully be termed an urban district. Additionally, the field test was equally skewed away from large school districts, be they urban or otherwise. Only Parsippany-Troy Hills and South Plainfield join New Brunswick in serving in the area of 5,000 pupils; the remaining 13 districts have far smaller pupil populations.

This skewness is inconsequential only if it can be shown that urban or heavily populated districts lack special needs that should have been addressed in the field test. Thus, if the deteriorating conditions of New Jersey's cities and the problems of school governance in those areas do not pose unique planning difficulties, there is no real need to make allowance and include urban districts. If the diversity of viewpoint in multi-class and multi-ethnic highly populated districts does not create special planning difficulties, there is no reason to make an effort to include such districts. Common sense alone, however, would indicate the fallacy in this reasoning. These types of districts will have special problems in establishing viable community participation and creating workable consensus on district objectives. Failure of the field test to include districts of this type and thereby to address these special problems limits its applicability to a significant portion of New Jersey's schools. Positive results from rural or suburban districts simply may not apply to an urban district.

It must also be remembered that all field test participants were volunteers. Each one chose to participate in the field test. To some extent this means that these districts are not likley to be fully representative of the state's districts. Self-selection usually indicates a favorable attitude toward planning and some prior experience in the planning area. For this reason, it may not be possible to completely generalize from the field test results to the remainder of the state's school districts; there may be significant differences between the two groups.

Other than the problem of representativeness, there is one further difficulty with the design of the field test - in large part it was a field test in name only. A test of any sort implies specifics as to organization and standards of performance. As executed, the field test lacked definite organization and performance standards. Only the most general provisions were set at the central level; decisions over procedure to be followed and standards of performance were left to the discretion of local or county personnel. Some of this leeway can be attributed to a conscious policy decision by the Commissioner of Education to leave much of the planning content to local officials. Still, the field test goals emphasized optimum performance, and there was little evidence that anyone with full responsibility developed concrete standards for performance or attempted to institutionalize them. Without central standards and with local discretion, only the influence of county and EIC personnel could work to keep the activities of pilot districts consistent with one another. This influence, because it was applicable to only a subset of the pilot districts, could hardly maintain uniformity.

The absence of standards and central control play a major part in the field test program. They not only affect the results of the field test, but they also affect its evaluation. Without central control, participants were left to their own devices. Thus, there plans reflected more

of an attempt to meet diffuse expectations, rather than an attempt to reach optimum performance levels. As well, it must be understood that any set of optimum standards now imposed on participants does not reflect the reality at the time of the test. Evaluation, to a certain extent, will reflect how the field test might have been designed and was not. It is unfair to hold participants accountable for that deficiency.

Field Test Participants

The pilot districts are best divided into two groups. In the first group would be the districts which entered directly into the goal development planning stage. For the most part, none of these districts had extensive experience with educational planning. In the second group would come the remaining districts which, because they had some prior planning experience, were assigned to one of the three latter planning stages. The two sets of districts faced fundamentally different problems and accomplished different objectives.

Goal Development

Of these districts assigned to goal development, the number was equally apportioned between the northern and southern sections of the state. Of the five northern districts, two were located in Morris County (Rockaway and Morris County Voc.-Tech.) and three in Middlesex County (Middlesex Borough, Spotswood and South Plainfield). Of the five southern districts, three were located in Camden County (Berlin, Gloucester City, and Merchantville) and two in Gloucester County (Woodbury and Elk Township). Five of the goal development pilots were either K-6 or K-8 districts sending their graduates to regional high schools; four of the goal development pilots were comprehensive K-12 districts. The remaining participant was a county vocational-technical school with a county constituency (We did not study this school). No regional high school, either 7-12 or 9-12, participated in the goal development stage of the field test.

The focal person for all district planning activities was the T and E Coordinator. Essentially, the coordinator was appointed to the task by the district superintendent and was responsible for developing, coordinating, and directing all T and E related planning activity within the district. The position was crucial because so much responsibility was placed on the position. Unless the coordinator fully understood what was expected of him and was capable of organizing the necessary planning activities, it was unlikely that the field test would make much headway in the district. For that reason, we also made the T and E Coordinator the focal point of our study. During our interviews with the T and E Coordinators, we attempted to establish his understanding of the goal development concept, his preparation for developing district goals, and his skills for organizing and coordinating groups involved in the goal-setting process.

Overall, the T and E Coordinators in the nine studied goal development districts showed themselves to be highly committed and very competent. During our interviews these coordinators evidenced considerable understanding not only of how best to accomplish the goal development but of its potential role in educational administration. They also expressed a commendable attitude and enthusiasm for the planning idea. Their competence demonstrates both a commitment on their own part and on the part of the district superintendent as well. It shows that the superintendents in the field test districts took their roles seriously and made every attempt to select the best person available for the position.

There was some variance in the way field test districts in this stage of planning approached the matter of coordinator selection. In about half the districts, the superintendent himself assumed the role of T and E Coordinator; in the other half, the superintendent appointed one of his administrative subordinates to the position (usually an assistant superintendent for curriculum and instruction). The factor critical in determining whether the superintendent would assume the coordinator position hinged on district resources and size. In the K-12 districts, not one superintendent was T and E Coordinator; in the K-6 and K-8 districts the superintendent was in every case either joint or sole T and E Coordinator. Smaller districts simply do not have the ancillary administrative personnel available to assign to the coordinator job. Although in no case did a superintendent/coordinator indicate that the additional job was a strain, it may become so in the future or it may be so for non-pilot districts. As full-scale implementation begins, the coordinator job may consume considerable time. Perhaps consortia of small districts in which each partially finance an experienced coordinator may resolve the problem.

Additionally, the coordinator's job does take time. The coordinators in the goal development stage reported that T and E related activities took between 25 to 50 percent of their time. While these figures may be inflated, they do clearly indicate that the task takes time and not always in ways that can be planned for. The coordinators also indicated that the amount of time commitment increased as the field test continued. Whoever holds the role will have to have large blocks of time available for planning activities.

While this information says something about the attitudes and time commitments of the T and E Coordinators, it doesn't say very much about what they actually accomplished. Performance is not quite as impressive as attitude. The primary criterion by which coordinator success can be assessed is by their ability to produce workable sets of educational goals. By the planning guidelines used in most districts, goal development was divided into three phases: creation of general ideational goals; selection of objectives giving concrete expectations with respect to meeting the goals; and construction of lists of goal-connected indicators by whose use progress in attaining goals could be measured.

Most coordinators arranged the process in a planning sequence. First, the broad-scale goals would be established, then objectives would be set, and finally, indicators would be chosen to match the goals. Although following different methods in adopting them, each one of these field test districts developed general goal statements indicating the district's educational aspirations. Basically, these goal statements were all alike-very broad, vague, and nonspecific statements in some way related to educational activity. By the state planning guidelines these goals were to gain operational meaning with reference to the objectives and indicators. Without these latter elements, the goals would remain mere general statements, constraining no behavior on the district's part.

Unfortunately, while each of the goal development field test participants developed these broad-based goals, they were nowhere nearly so successful in establishing objectives and indicators. Only four of the nine goal development pilots studied had moved into the objective/indicator phase of the goal-setting process. Those districts that had progressed into the second phases showed an ability to grapple with and understand the place of indicators and objectives in goal setting, but they did not fully understand what place either component would play in the actual educational practice of the district. In other words, it was not clear what these goals would mean in terms of the classrooms and schools of the district.

Perhaps this lack of understanding has much to do with the way field test districts approached educational planning. As stated above, those districts placed in the goal development stage were those without significant planning experience. In most cases neither the district itself nor the T and E Coordinator had educational planning background. Moreover, due to the design of the field test, the coordinators were not provided with specific information as to how they were to perform their planning functions. This resulted in attempts "to do something", to demonstrate that an effort had been made. Lacking firm guidance and feeling the need to produce a product, many districts dealt solely with the least complex and most manageable of the planning tasks, creation of goal statements.

Supporting this generalization is the fact that experience of the coordinator played such an important role in creating a highly organized planning system and a complete goal development package. Of the six districts judged to be highly organized, four of them were headed by coordinators with successful planning experience. In at least two cases the coordinators were brought into the district specifically for the purpose of directing field test planning. In those districts which were not highly organized, the T and E Coordinator had no previous planning experience. Of the four districts which produced a relatively complete goal development package, three of them were headed by a coordinator with substantial planning background.

The implication of these findings for other districts beginning planning should not be overlooked. On the one hand, they mean that districts without an experienced T and E Coordinator are likely to encounter more problems or have greater difficulty resolving the same problems than are districts with experienced coordinators. Secondly, it points out the need for some type of central direction. Whereas, districts can produce effective goal development results without experienced coordinators (Middlesex Borough is a good example of this), they are far less likely to do so. Districts without someone to give experienced direction need guidance from some source. Since so many districts in the state can be characterized as inexperienced and since the pool of experienced educational planners is so small, this constitutes a major problem in the administrative planning system and must be resolved.

The two primary sources of concrete guidance for the field test districts were materials prepared by Research, Planning and Evaluation. The first was Modelog, an annotated bibliography of planning resources available nationwide and a draft copy of the state planning guidelines. Modelog contained listings of very general planning materials, and the guidelines contained a framework for planning activities. Thus, the guidelines outlined what the districts were to do but were not specific in detailing how it was to be done. Surprisingly, few of the field test districts bothered with either publication to any great degree. The coordinators who did use them were usually those with prior planning experience; those without experience found the materials vague and confusing. Singificantly more than one coordinator stated that he placed the materials in his desk drawer upon receipt and there they stayed. Where this occurred, guidance often came from the county office or the EIC. In some cases, however, this guidance was not available, and the field test district floundered.

One of the primary requirements of the Public School Education Act was that educational planning be a community process. Under this definition goal setting was to be a combined effort of the schools and the community served. Each was to have effective input into how education should proceed in the district. To some extent, therefore, the field test was to include an assessment of how community-based educational goal setting would work.

Many of the pilot districts experienced very real problems in simply defining who the community was and what role it would play in the activities of the district. Research, Planning and Evaluation guidelines left much of the decision in this area to the discretion of district personnel. Thus, while some of the pilots went to great lengths to encourage community participation in the goal-setting process, others accorded it far less stuats. Of the districts going to great trouble, only some were able to incorporate the community into the workings of educational decision-making. Others went to great effort to acquire participation but merely used it for cosmetic or symbolic benefit.

Every one of the goal-setting pilots had some form of community participation. In this most basic way, the requirements of the legislation were met. In no district, however, was the community encouraged to or did it take initiative to exercise direct control over the planning process. At best, the community was something less than an equal partner of the district administration; at worst, it was merely included in the formal goal setting process because the act so stipulated.

Organizationally, community participation took several forms. In two of the pilots (Berlin and Merchantville), the T and E Coordinator proceeded individually without establishing a formal community governing board. Direct community involvement was limited to the actual selection of the goals themselves. In the remaining seven districts, some type of formal steering committee with responsibility for overseeing the goal development process was established. Four of these districts created steering committees with a community mix. This included school board members, parents of school children, members of civic organizations, area businessmen, students, teachers, and district administrators. Two districts formed committees made up solely of teachers, and one district had two committees - one of community members and one of teachers.

Even in the seven districts with some type of steering committee, power was not widely distributed. For the most part these committees merely served as extensions of the T and E Coordinator. Their primary role was to legitimate decisions made by the coordinator and the district superintendent. Of the committees with community memberships, only two had direct decision-making powers, and even this was at the discretion of the coordinator. Only in the district with two steering committees was substantive power allocated to these bodies.

There are a number of reasons for this. Not least of these is the fact that community involvement in school governance is a new and potentially threatening experience. Although coordinators never explicitly verbalized it, some had considerable apprehension over the eventual impact of community participation on the district. For this reason, the direct control over the activities of schools was in many cases carefully skirted as an issue. In no district did we find substantial evidence that community members played a crucial role in goal setting. Quite the contrary, there was no evidence that community members had collective points of view concerning education; most were content to merely participate in the goal-setting framework established by the district T and E Coordinator.

Although the actual method of goal selection did vary from district to district, essentially, only two methods were used: the direct and the indirect goal selection models. In this latter model, large numbers of community persons were not involved in goal setting. Rather the district steering committee or a specially chosen citizens group was given the task of goal selection. The committees were to consider possible educational goals for the district and choose those they thought best represented it. In two of the three districts using the indirect method (Spotswood and Woodbury),

the final committee lists were then submitted to the larger community for its ratification. In the remaining district (South Plainfield), the committee list was submitted to the district steering committee and to the district teachers for their approval.

In the more direct goal setting method, persons from the community actually participated in goal selection. Larger numbers of community persons were invited to a general meeting where the need and purpose of educational goals were explained to them; they then were assigned the job of goal selection. Three of the districts mixed community members with administrators, teachers, board members, and students. Here, the T and E Coordinator felt that sharing of viewpoints and added perspective gained from mixing were valuable contributions to the district goal setting process. In the other three districts, the various segments of the district were kept separate from one another. Each went through its own goal selection procedure, and each produced its own set of goals. Thus, there were community goals, teacher goals, student goals, and so on. Final resolution of the different goal sets was left to the discretion of the coordinator.

Regardless of who participated in goal-selection, only two methods were used for deciding upon district goals: a closed-ended, "packaged" system or an open-ended, less structured system. In the latter method, far fewer constraints would be placed upon the decision-makers. They would meet, suggest the goals they thought most suitable for the district, and resolve their disagreements by some form of consensus discussion. Central to the open-ended method is the source of the goal statements-they originated from the suggestions and discussions of the participants. In the closed system, on the other hand, list of probable goals are supplied to the participants prior to any discussion. These suggestions form the foundation for later discussion; decision-making focuses on the adequacy and priority of listed goals. Although participants are free to add to or subtract from the list of possible goals, they rarely did so.

Both methods have definite advantages. The open-ended method is likely to better reflect the thoughts of the community members and probably is a better educative tool. The method requires a far greater investment of participant time and greater organizational effort than does the closed system. This closed system provides the structure which many participants feel is necessary to deal with such a broad and ill-defined area as education. Yet, because so much is provided, it may reduce participant coming-to-grips with the purposes of community education that the open system encourages.

Most of the goal development pilots used the closed-ended system. During interviews the T and E Coordinators repeatedly emphasized that their own time limitations and need for participant structure led to this choice. In effect, they felt that the closed system lessened the need for coordinators to establish their own planning system and the burden of constructing a satisfactory goal list. Use of the packaged system immediately resolved these potential problems-the list of goals supplied narrowed the choices to a manageable level and provided a framework for discussion. It established the necessary foundation for coordinators and participants alike.

Five of the districts (Merchantville, Gloucester City, Middlesex, Spotswood, and South Plainfield) opted for the goal-setting package marketed by Phi Delta Kappa. In this method, a list of 18 goals are supplied to the participants. They must then evaluate the adequacy of listed goals, discuss them, and rank them relative to one another. Two other districts (Elk and Woodbury) used the closed system. In this case the method was a Phi Delta Kappa goal setting model modified by EIC-South. This method permitted more participant input than did the straight Phi Delta Kappa Model.

There is some question, however, as to whether the advantages of the Phi Delta Kappa-type closed system outweigh their disadvantages. First of all, the 18 alternative goals provided in the package do not really go to the heart of educational purpose. The choices run the gamut from emphasis on the school as a cultural institution to emphasis on the school as a mechanism for socializing citizenship skills. Almost invariably, community participants focus solely on the attainment of basic educational skills, and this goal uniformly ranks as their first choice. Thus, the system contains many choices about which participants are relatively indifferent and only one choice that really goes to the heart of community preference. The fact that participants are willing to rank statements does not mean that the statement is salient to them.

It would appear reasonable to expand the range of choice within the areas of greatest community interest and to consolidate goal alternatives where interest is low. By so doing, it would be possible to ascertain far more about decided community preference (i.e. which basic skills, in what combination, with what emphasis, and in what manner they are to be taught) and to utilize them as real sources of administrative guidance. Unless such changes are made, the resulting goals will in reality indicate very little about community educational preferences.

As a second disadvantage, the Phi Delta Kappa system does not directly encourage those selecting goals to confront the educational consequences of their choices. As the system generally proceeds, participants are invited to discuss a list of goals and to rank them. This is not informed community participation. It does not account for the unfamiliarity of the public with the educational goal concept or with their lack of knowledge of district schools. Community members may never have considered how the schools should operate and especially not in goal-related terms. Likely, they will be unable to specify what the goals selected will mean to the educational practice of district schools. Without some attention to these problems, goal setting will be a process without content.

Significantly, it is for these reasons that the closed-systems were chosen by the coordinators. The whole process can be done "cold", with no prior participant preparation. Perhaps just as importantly the Phi Delta Kappa system permits construction of an immediate and tangible product. During the field test, the need to produce something definitive acquired a premium. The model establishes limits for goal development and simultaneously creates a product whose legitimacy is well accepted. It may well be that this source of security is spurious. Perhaps the very answers the model provides are the very ones that the participants and coordinators should themselves be considering and wrestling with.

Most of the coordinators who used the Phi Delta Kappa model report satisfaction with it. They state that community participants became interested and excited during the goal setting meetings and that the model provided the essential framework without which goal setting would have proven futile. Their criticisms were limited to the closed nature of the model procedure. Many coordinators felt that the goals could have been better stated and more representative of actual school activities. As well, some coordinators felt that the prior goal listing stifled creative discussion among the community participants. Yet, to a person, they judged these disadvantages not to outweigh the model's more compelling advantages.

Two districts (Berlin and Rockaway) chose to use a more open-ended goal selection method. The different approaches of each district reduced to individual consideration of what the educational emphasis of the district should be and an attempt to translate these basic principles into a set of binding statements. In Berlin the coordinator spent considerable time and effort in training the participants to think in a goal-related manner and to recognize what the meaning of goals might be in practice.

This was not a simple cut-and-dried process; however, it consumed large amounts of time, involved a great deal of wrangling and apparently wasted time, and required patience and leadership skills from those responsible for directing the process. Coordinators who used this open-ended process reported that those who participated in it felt definite ownership of the eventual goals and tended to continue their involvement past the original goal-setting meetings.

One could not choose between the two methods on the basis of their products. These look very much alike. Each method tends to produce a very general list of goal statements. And this reflects on the goal-setting process itself. Certainly, it reflects very little about the district community.

Many of the districts accomplished nothing beyond the basic goal-selection. Only three of the nine had completed the indicators selection phase at the conclusion of the field test. Berlin, Merchantville, and Woodbury had each reached the indicators phase, and the other pilots had not. Thus, in six districts, little organized effort had been made to establish operational meaning of the broad goal statements. Without indicators the goals remain ineffectual and empty phrases. In those districts where indicators had been selected, this was done without reference to the community. Reflecting the professional versus public dichotomy, these three districts chose to delegate indicator selection to the instructional staff of the schools. The community was to set general goals, and the instructional staff was to translate these into operational language for the classroom.

This trend is more than a little disturbing. First of all, it reduces community participation to a meaningless phrase. The state gudelines were predicated upon the idea of sequential planning. One stage must be accomplished to set the foundation for the latter. Understanding of the meaning of goals is predicated upon the content given from the indicators themselves. Until this is done they remain content free. As the participants advance from the general (goal selection) to the specific (indicator selection) the meaning of what they have done becomes clear. If community participation is limited to the very general, community members will not come to understand what their schools are about or be able to utilize the goals in community control as the Public School Education Act intended. Equally as severe, isolation of the indicator selection process will likely not result in improved school performance. The instructional staff, outside an area where its assumptions may be questioned, will tend to equate what is presently done with the orientation of the general goals. Indicators will simply be assimilated into existing methods of instruction.

Regardless of who selects the goals or how they are selected, the entire process may prove to be superfluous unless something is done to redeem it. Very general goal statements are unlikely to have direct effect on the educational functions of schools. The community participation requirement was satisfactorily bypassed in such a way that participants had and will have no untoward impact on school operations. Moreover, emphasis on the goals themselves rather than their meaning made it unlikely that they would be controversial or have operational content. At the indicator selection point, where the process becomes more specific, the community had been effectively removed.

This segmental approach to educational planning where stages are analytically separated from one another and then taken in sequential order also raises problems. As goal development is removed from needs assessment or program improvement, the planning process loses its holistic impact. If goal development is not concerend with and directly connected to program improvement, there is no guarantee that goals will be understood in a school context or that they will be understood and implemented in the manner community participants envisaged. Few of the T and E

Coordinators interviewed expressed any real appreciation of what the goals just selected would mean in educational operation of the district. The goals were selected without regard for their implementation and without regard for how schools would function to achieve them. It seems only reasonable to conclude that few administrators expected them to play any significant role at all.

On balance, goal selection can best be seen as a political process in which each set of actors with a stake in the outcome tried to maintain its position. Administrators had the largest stake to maintain. Thus, they consciously or unconsciously used the process to preserve their relative positions. At all times and in all communities, the goal development planning was under control of district administrators. The fact that products of planning so little affected the district status quo and penetrated so slightly into the internal operations of the district administration cannot be accidental. Moreover, the assignment of concrete planning tasks to the district professionals assured that the interests of both groups will be protected. In this phase professionals are without undue constraint from community goal perceptions in selecting indicators. There is no reason to expect, unless some major change is made, that it will be otherwise in those districts which have yet to begin developing their goals.

In sum, the goal development stage of the field test yielded mixed results. From a positive standpoint, it demonstrated that districts could organizationally meet the planning requirements. In skilled and often innovative ways, the districts created methods for goal-setting and constructed lists of goal statements. Furthermore, all this was done with a minimum of direct guidance. Yet from a negative standpoint, the field test demonstrated that educational planning is a far more complex and difficult activity than most persons anticipated. Although all districts selected goals, they often did so without regard for their educational meaning and applicability. Although every district had some form of community participation, it played little role in process governance and in the concrete aspects of educational planning. Failure of the goal development stage to address operational problems did not auger well for success in the remaining three stages. Emphasis on creating a tangible product over that of wrestling with the use and impact of educational goals provides a glimpse into the future. Significant educational change resulting from the process may be the exception rather than the rule.

The goal development stage of the field test established that the mechanisms of planning can be successfully duplicated in the districts. It did not establish that serious, representative educational plans can be constructed and used. Responsibility for this lack of attention to the most important aspect of planning rests with those who administered the field test.

Needs Assessment, Program Improvement, and Program Evaluation

By far, the preponderance of the field test was placed on the goal development stage. Clearly, the primary need was to ascertain how well the first stage worked since it would be the starting point for all or most districts outside the field test. Also, there were very few districts with the requisite background to justify placement in an advanced planning stage. Six districts in the field test were assigned to one of the latter planning stages: Clearview Regional High School and Madison were assigned to program improvement; and New Brunswick and Parsippany-Troy Hills were assigned to program evaluation.

In most cases, districts selected for latter stage field testing were those with on-going programs falling within a particular planning stage. Thus, Clearview, which had completed a School

Improvement Program a year previous, and Madison, which had already developed a listing of district goals, were deemed sufficiently advanced to warrant placement into needs assessment. Kingsway and South Brunswick were both in the midst of large scale program-related Title III grants, and for that reason were selected for the program improvement planning stage. Finally, New Brunswick and Parsippany-Troy Hills had developed long-standing programs with an evaluational component. They were therefore chosen to field test the program evaluation stage.

Unfortunately, with these six latter stage planning pilots, it was not at all clear exactly what, if anything, was being field tested. Although each district was assigned to its planning stage on the basis of superfically correct standards, almost all the districts were in reality misclassified. Given the sequential model promulgated by SDOE, a district placed in one planning stage must have completed the stages immediately prior. Thus, a district cannot begin a needs assessment unless it has first established educational goals. By this simple standard of proper ordering, four of the six districts were misclassified. Clearview had not yet completed a goal development program prior to beginning its needs assessment; Kingsway had not undergone a needs assessment; and New Brunswick and Parsippany-Troy had not attempted goals development or needs assessment.

These misclassifications are of more than mere academic interest, for they go to the heart of exactly what this latter segment of the field test was to be about. Lacking goals, it is difficult to establish a common foundation from which needs could be adequately established. This difficulty becomes further compounded as the districts experience a greater span between where they are placed and the requisite background experience.

In point of face, however, misclassification alone could have been easily resolved by revision of assignment or simply treating the districts as field test examples of where they should have been placed. The problem was further compounded by the initial selection process: many districts were selected to be advanced-stage pilots which had currently operation grants and/or projects, and these grants defined the scope of their efforts. In effect, they limited the validity of the field test. In numerous cases, districts simply chose to confine their activities to these programs and utilize them as their field test emphasis.

This made for no test at all. Districts maintained their programs, and these often bore little resemblance to the state planning guidelines. As a consequence, the field test results for these districts are fragmentary and hard to interpret. The only sure piece of information is that the programs were no in way adequate tests for the latter three planning stages.

For example, the needs assessment field test clarified almost nothing about the workings of that stage. Clearview Regional High School had at the time of its participation no set of goals to use as an assessment foundation. Although it is possible to use ad hoc standards for an assessment, even this was not done. Clearview had produced no needs assessment by summer and had spent much effort attempting to fit lists of SIP recommendations into the Our Schools goals. Very little of this activity directly related to a formal needs assessment.

The picture was no brighter in Madison. Although the district had undergone goal development in the year previous and had done an excellent job in the process, very little was accomplished relative to needs assessment. The district did attempt to validate its earlier goals by the community, but organizational and informational difficulties limited further progress. The district produced little needs assessment material.

Thus, insofar as the needs assessment stage is concerned, there is no information available as to its feasibility or optimal implementational pattern. The very fact that this condition occurred says more about the operation and administration of the pilot test than it does about the districts themselves.

The inability of the two pilot districts to address the needs assessment stage may say something about the definition of the stage itself. From the basic reference, the state planning guidelines, it is not altogether clear what a needs assessment is to be or how it should be carried out. At a minimum, the guidelines are sparse in content regarding this critical area. What information is provided emphasizes information sources and measurement problems. These are not the most significant problems likely to be encountered in the field.

Program improvement had somewhat better success than needs assessment. Kingsway Regional High School was in the third year of a Title III grant awarded for the purpose of establishing regional planning among the school's constituent sending districts. The regional was in a good position to make significant strides in program improvement - the grant financed an educational planner for the district and it had already completed the requisite goal development and needs assessment stages. Although the decisions as to what programs to pursue were not reached in a totally systematic manner, Kingsway did opt for two programs: a student advocacy project to increase student school involvement and a study skills program to improve the learning skills of students needing assistance. Essentially, however, these two programs came to naught. Labor relations problems racked the school and work was dropped in the two programs. It was not again attempted. The regional then began a structural reorganization of the attached junior high school. The relation of this project to the field test is not clear.

The second program improvement pilot, South Brunswick High School (the high school was the center of the district's planning effort), had earlier completed both a needs assessment and a goals development process. At the time of the field test, it was in the second year of a large Title III grant aimed at improving student learning skills. The high school had emphasized improvement in discrete cognitive areas. By recognizing the change agent potential of teachers and by giving them the skills necessary to perform the role (definition of objectives, data and record collection, use of training materials) and by rewarding them for participation, the South Brunswick High School program was apparently a structured and very definite approach to program improvement. From its initial success, the high school broadened the skills improvement program to encompass ever larger numbers of skill areas and teacher volunteers.

Even here, however, there was disquiet about substantive progress. Whereas the rhetoric of the program seemed convincing and properly directed, little in the way of concrete action was demonstrated as it applied to the field test itself. The T and E Coordinator made it very clear that the South Brunswick High School Project was an on-going and heavily financed one. Its relationship to state planning guidelines was entirely superficial: the high school did not consult nor use state materials; it simply continued the pre-existing project in its previous form. Whatever the possible merits of the South Brunswick Project, the case cannot be made that it represented a field test of program improvement.

Equally without foundation as field tests were the activities of the two evaluation pilots. Parsippany-Troy Hills had been selected as a field test district solely because of its prior curriculum development experience. By its system, several faculty/community members formed committees to assess curriculum adequacy in functional academic areas. Their purpose was to judge the present curriculum and to recommend needed changes. This committee activity continued during the field test period.

The problems arise with respect to Parsippany-Troy's field test effort. In the first place, the district was misclassified. By the planning stages outlined in the guidelines, the district fit into needs assessment and program improvement rather than evaluation. Few coherent programs had been developed in the district, so there was not a great deal to evaluate. As best as could be ascertained, most of the district's efforts were aimed at program improvement, and not at evaluation. In the second place, whereas needs assessment and program improvement activities in the district were sophisticated, they were also often without consequence. Little evidence can be provided for their being organized actions with classroom impact. Committees met, did their best to set problems and structure responses to meet them, but frequently did little to implement them. The programs remained broad-based unexecuted ideas. Thus, the Parsippany-Troy experience indicates virtually nothing about the optimal implementation of the evaluation stage.

New Brunswick was the second district assigned to the evaluation stage. Like Parsippany-Troy and South Brunswick, New Brunswick has a long history of internal improvement projects. For this reason, it was selected to field test the evaluation materials. As with the two other districts, however, little emphasis was placed on field testing. Instead, the district simply continued with its Title III project aimed at rationalizing curriculum, improving its performance and staff attitudes, and raising pupil achievement by means of instituting performance-based education.

In point of fact, the program was extremely ambitious. It included the adoption of peer teacher assessment, use of behavioral indicators for assessing curriculum success, and classroom teacher use of performance goals. Special training and in-services were liberally used to educate teachers and administrators in the new expectations created by the program. Essentially, the district was attempting to redefine its objectives and the means for achieving them.

The evaluation effort in New Brunswick centered on an assessment of the program. The district intensively tested student performance in an attempt to create differential scores and administered attitude surveys to both students and teachers to establish their satisfaction with the schools. Additionally, teachers were asked to report their judgments of positive or negative changes in student performance and attitude. This constituted the essence of the New Brunswick evaluation system.

The evaluation procedures used did not seem altogether applicable to the program outlined above. The evaluation centers on matters of student performance and teacher assessment of student changes. It also included attempts to examine teacher and student support for the schools and their programs. While these may be secondary outcomes of the program, they are not its primary aim. That was to change teaching methods, conceptions of the teaching role, and to begin study of actual classroom performance as measured by standard criteria. It would be difficult to assess the secondary impact of a program unless one first knew that its objectives had been met and to what degree. Only then could changes in student attitudes and performance be placed in proper context.

Although district administrators and especially Eliot Spack, the Coordinator, were sensitive to problems of program implementation, they had collected few systematic data to examine its workings. While they realized that some problems existed with respect to use of standards in peer assessment, and with differences in teacher understanding, acceptance, and use of behavioral objectives, they did not know precisely where the problems existed (with what teachers or to what degree) or how they affected program success. Without such information, evaluation could not answer the New Brunswick program questions. Thus, little information was added about ability to use state guidelines to effectively evaluate district programs.

Overall, the field test districts for the latter three stages of educational planning present a barren picture. Some districts, to be truthful, accomplished nothing concrete. Other districts did little or nothing that they had not been doing previously. And only one district (Kingsway) made a real effort to place its activities in the context of state planning guidelines. The time and energy expended left conditions exactly where they were before- no one yet knows whether needs assessment, program improvement, and evaluation can be optimally implemented according to established formats.

The responsibility for this situation was an administrative one. Those who managed the field test did not articulate a clear series of expectations for the six districts. They took minimal actions to insure that the activities of the districts would assist in meeting field test goals. Instead, they accepted as an operating fact that districts would only accept the least amount of direction. As a result, the field test emphasis was lost, and the goal for these six became one of legitimating the educational planning idea by using any possible activity as evidence that educational planning worked.

Counties

Under the decentralization plan adopted by the Commissioner of Education, county superintendents were given greater and more inclusive operational responsibilities for the districts in their areas. County superintendents were charged with monitoring district progress and compliance with the educational planning requirement. The superintendent and his staff were to take steps sufficient to insure that each district met the provisions of the law and regulations.

Three potential obstacles stood in the way of successful completion of this assignment. The first of these was the willingness or capability of superintendents to successfully adopt the new role. The second of these was the amount of authority possessed by the superintendents and their capacity to exert control over local districts. And the third of these was the availability of staff resources necessary to perform the new role.

In the field test, the first of these problems was observed by careful selection of county participants. Of the four counties involved, three of the superintendents has recently been assigned to the position. Each of the three (Don Beineman in Camden, Rita Carney in Middlesex, and George Snow in Morris) were appointed directly from the ranks of SDOE personnel. The final superintendent, Gus Ruh of Gloucester, had a similar SDOE background but had held his position for a somewhat longer time. The three recent appointees were acting superintedents during the bulk of the field test, while the remaining superintendent held a permanent position. This selection process insured that the participating county superintendents would be supportive of educational planning, would have an understanding of the state planning doctrine, and would accept the role assigned to them in that process. Personally, it meant that the superintendents would likely welcome the expended functions of the county superintendent rather than be content with a limited conception.

The second factor affecting success was less under the control of the SDOE. Educational planning as defined by regulation stood more as a matter of local initiative than of centralized control. For this reason, the superintendent could not always be in a position to direct the planning actions of his local districts. This promised to be more a matter of negotiation and compromise and be greatly dependent upon the superintendent's degree of acceptance with his local districts. Given the process orientation developed by SDOE and the absence of fully specified planning guidelines, county superintendents frequently lacked the control leverage provided by definite language

mutually understood and accepted by county and local personnel. Without definite requirements, the task of county superintendent became more difficult- he had to get the planning job done and simultaneously maintain the necessary good will of local superintendents. Serving two masters in this way meant that planning product varied from county to county and from district to district within the same county. Some county superintendents had both local superintendents who were responsive to his directives and others who were unwilling to complete anything more than the minimal requirement. Herein lies the real problem in assuring uniformity in planning.

The SDOE planning model assumed that the counties would have the human and material resources requisite for carrying out their functions. This meant provision of trained staff sufficient to monitor the 25-30 districts comprising the average county. Ideally, monitoring personnel would conduct frequent intensive visits to each district within the county and to many of its constituent schools. During these visits there might be consultation between the county representatives and the district coordinator or superintendent. The county representative might seek information on district level of progress, problem areas encountered by the district, and its future plans. From these visits the county office would have specific information on each district under its control.

Certainly some form of monitoring was called for and can be effective in assuring optimal district performance. Yet it seems clear that not all counties were prepared to perform this role. In the four field test counties, there was considerable disparity in the number of staff available for monitoring and in the preparation of that staff to actually conduct effective monitoring visits. The two southern counties had full complements of trained personnel or persons with compatible background to do the job properly. Each had approximately five curriculum and instruction specialists available to conduct monitoring visits. In Camden County, each curriculum and instruction specialist was normally responsible for 5-6 districts. If a district under his responsibility was selected as a field test participant, he added the field test monitoring role to his list of duties. In this way, the prior relationships built between the staff person and the district superintendent were preserved. In most cases, adding the monitoring role did not really cause that much change since county staff were already encouraged to monitor in their normal visits. The situation was much the same in Gloucester County. There, each specialist was also normally assigned five districts and the monitoring duty was added if a field test district was one of "his own".

In the two southern counties, the approach to the field test was more similar than not. Each had assumed an activist role with respect to educational planning. Both Don Beineman and Gus Ruh had attempted to educate constituent districts to the need for educational planning and its possible uses. Gus Ruh in Gloucester, since he had held this position longer, had already instilled in his superintendents an acceptance for planning and had held several meetings with his superintendents for this purpose. Additionally, both superintendents had attempted to establish firm standards of performance for districts participating in the field test. Each assumed a primary role in selecting field test districts within his county and in assigning them to their particular planning stage. County curriculum and instruction specialists were to be directly and continuously involved in the monitoring of district performance.

Differences between the two counties were matters of degree. Gus Ruh permitted field test participants considerable leeway in planning procedure. Each participant had discretion in methods and processes used; monitoring was geared more to acquiring information about progress than twoards actually exerting direct control. Don Beineman attempted to systematize approaches taken by districts and instituted reporting requirements to insure that approaches were compatible with one another. Moreover, Camden County emphasized monitoring in the sense of assessing

district progress and taking steps to help resolve those problems. Although it is not possible to divorce technical assistance from monitoring, and especially with a county staff used to providing such assistance, Camden County did seem to define monitoring more from the perspective of control and assistance than did Gloucester County.

In the northern part of the state the situation was far different. In contrast to the relatively large and trained staffs which so marked the southern counties, the two northern counties were almost totally without this type of resource. Morris County had two resource teachers with background in art and music who had to be jury-rigged into the field test apparatus. The two were without prior training in educational planning and were not familiar with the conceptions underlying it. Middlesex County had one school program coordinator, also untrained, who was pressed into service in a monitoring role.

In addition, the attitudes of the county superintendents were different in the two regions. Whereas the superintendents in the south assumed an activist role regarding the field test, the superintendents in the north were more laissez faire. They permitted their districts the greatest latitude in educational planning and involved themselves only whenever these boundaries were exceeded. Thus, for the most part, districts in the north went it alone; there was very little direct supervision or intervention from the county office.

One cannot easily establish to what extent the role differences were products of differences in resources or temperament. It seemed to be a combination of both. Neither Rita Carney in Middlesex nor George Snow in Morris saw themselves in a highly activist role. Each felt that his districts would benefit most from a "work as you go" approach as opposed to direct and active supervision. On the other hand, both Rita Carney and George Snow stated that they would have preferred for the county office to do more; they simply lacked the resources to do very much more. Essentially, they attempted to maneuver in a difficult situation.

The differences in attitudes and resources were reflected in the reports of county contact by district T and E Coordinators. Southern districts reported fairly frequent contact with personnel in the county office, but districts in the north reported far less frequency of contact. Camden seemed most successful in this regard. Coordinators in Camden not only emphasized frequency of contact but the importance of these contacts. In all cases a supportive relationship had been built between the county curriculum and instruction specialist and the district coordinator. Reports from Gloucester County pilots indicated contacts there to be frequent as well, but it appeared that these contacts were less important for the field test activities of the district. This may reflect the differences in attitude of the two county superintendents.

In the north, however, the situation was dramatically different. Two districts in Morris County reported very infrequent contact with county office staff. The remaining district reported fairly frequent contact but indicated that the county staff member primarily observed and attended meetings. There was little staff involvement past this passive approach to monitoring. In Middlesex County, communication between the curriculum and instruction specialist was primarily by means of telephone. Periodically, the monitoring person would telephone the district coordinators and discuss the field test. Coordinators reported this to be little assistance to them. Other than the initiatives taken by Rita Carney to hold meetings with county field test districts and to facilitate EIC-NW involvement, this seemed to be the core of the county monitoring effort.

Differentials in staff training were also significant. T and E Coordinators in the south were uniform in their praise for county personnel. They felt the staff to be highly competent and understanding of the problems in educational planning. Coordinators in the northern counties felt that county personnel (excepting the superintendents) knew far less about educational planning than they did. As a result, they did not perceive the county staff as valid sources of assistance and were unsure of its ability to perform accurate monitoring.

Lack of state training program for county personnel loomed large here. For those counties with prepared personnel, the absence of a training program made no difference. In these counties, the staff understood what was expected of it and could quickly rectify whatever training deficiencies existed. In the northern counties, this experiential foundation was not available, and it proved impossible to compensate for it. It meant that, regardless of preferences, the county superintendent without trained personnel was incapable of fulfilling his role. Instead the county simply had to "muddle-through" as best it could.

This is not to say that training would necessarily have made the difference. Perhaps training would not have added significantly to the skills or actions of county personnel. Without training, however, county personnel certainly could not competently perform the role assigned to them. If county personnel cannot be trained to monitor adequately, the entire administrative planning model is incorrect and must be revised.

Based on observations, it does appear that county monitoring can play a significant role in district success. This could be accomplished in two separate ways. First, the county staff could enhance district performance by clearly communicating expected performance standards to districts and insuring that they are properly understood. Most county staffs attempted to perform this role, but some did a better job of it than others. The Camden County office served as a "translation" station between the SDOE and the county districts. Staff personnel met regularly with district coordinators, stipulated what the district was expected to do, and solicited agreement from the coordinators. Gloucester County, as a result of its field test experiences, prepared a "cookbook" for educational planning to give districts a foundation for recognizing what was to be expected of them. Middlesex, also as a result of its planning experience, required each district to submit a "plan to plan" specifying exactly what the district intended to do. This served as a basis of discussion between the county office and its constituent districts.

As a second means of improving performance, the county office could take an active part in the monitoring of district activities. Rather than simply observing and reporting district actions, the county staff could interpret these activities according to guidelines or other agreements and make recommendations for change wherever it was needed. Very few counties really adopted this active role. Yet where it did happen, the results were favorable. In Camden, the county staff worked with the districts very closely. Two of the three Camden pilots (Berlin and Merchantville) completed the entire goal development stage during the field test. While most of this performance is certainly attributable to the skills of the coordinators, Charles Carramana and Ernest Barlow, credit can also be given to the performance of the county staff. In Gloucester County, the staff attempted to play this more active role, but was hampered by the assignment of districts to different planning stages. In Camden, Superintendent Beineman insured that each of his districts was assigned to the same planning stage; in Gloucester, the four districts were assigned to three different planning stages. This made successful monitoring very difficult.

In sum, the state model based on county monitoring appears to work. Districts accepted the county role and perceived a need for monitoring. Unfortunately, not all the counties had the staff or training to adequately complete the task set for them. Unless staffing and training are provided, there is no reason to expect that counties will successfully fulfill this role in the coming years.

Educational Improvement Centers

Other than the districts themselves, which were responsible for the actual educational planning and its implementation, the Educational Improvement Centers formed the most crucial link in the administrative planning system. According to this planning system, the EICs were to provide all forms of technical assistance needed by the districts in their planning efforts. This

encompassed a major task. If not done or not done properly, districts would simply be unable to fulfill their planning responsibilities, for it is to the EICs that they must turn for help in devising their plans. If the technical assistance was done well, districts could overcome serious experience and resource problems.

At the time of the field test, only two EICs were in operation, EIC-Northwest and EIC-South. Since field test completion, two more EICs have been added, one in the central region and one in the northeast. Each of the EICs has technical assistance responsibility for all districts located within its area of coverage.

For the field test, EIC-South was to provide technical assistance for the two southern counties, and EIC-Northwest was to provide technical assistance for the two northern counties. While this meant no change in coverage for EIC-South, it required an adjustment on the part of EIC-Northwest. Morris County was within its coverage area, but Middlesex County was not. Thus, as part of its working responsibility, EIC-Northwest had to establish relations with the five districts which had not before used EIC-NW services. This imposed an additional burden on EIC-NW. It had to do more than simply make its services available; it had to learn to work with a new clientele as well.

Overall, the work of the two EICs was the most impressive part of the field test. Although there were some assistance problems and some potential problems of coordination with county offices, the EICs performed their roles in an exceptional manner. Personnel from the EICs were invariably reported by the coordinators to be well trained, helpful, competent, and organized to provide maximum assistance. Our interviews with EIC personnel reinforced the accuracy of this conclusion.

Internally, both of the EICs approached educational planning in the same manner. Tom Hamill of EIC-NW and Paul Winkler of EIC-S each perceived the assistance problem as a matter of process training. District personnel had to be trained in the methods of decision-making applicable to their particular planning stage. Therefore, every member of the EIC support staff (above five in number) was assigned responsibility for processes relevant to a particular planning stage. So, when a district contacted the EIC for assistance, it could be directed to the particular staff member having that background.

Both EICs reported that this specialized division of staff labor worked well. It meant that each staff member dealt with a specific planning area and that districts in particular planning stages could contact the same staff member for assistance each time. This made for continuity in service and permitted the EICs to use their small numbers of staff in the most efficient way. The only variation in this pattern occurred in EIC-NW where Arnold Ettinger was given sole responsibility for working with the Middlesex districts regardless of their assigned planning stage. This was done to facilitate usage of the EIC by these new customers. Ettinger personally visited each of the Middlesex districts to acquaint them with EIC services and to discuss problems in planning with them.

Both EICs were consumer oriented, and this came out very clearly during the field test. Their staff saw the organization as a service agency geared to resolving the problems and meeting the needs of district users. Both, moreover, saw their role as reactive. Districts brought their problems to the EIC, and the EIC worked with the district until it was satisfied.

Based on the field test, this appeared to be a critical flaw in the EIC system, and one which will grow in import as more districts become involved in educational planning. Leaving initiation of contact to the discretion of a district relied solely upon the perceptions of the coordinator. It assumed that the coordinator would recognize when a problem occurred and turn to someone for help when that moment arose. Interviews with field test coordinators showed that fully half of the pilots had absolutely no connection with the EICs prior to entering the field test. Only after the field test had begun and meetings were held stressing the availability of EIC services did districts take advantage of these services. If the self-starting, volunteer districts comprising the field test were unlikely to

turn to the EICs for help, it is unlikely that other, less venturesome districts would do so.

Further there was the question of whether most coordinators would recognize when they had a problem. Some districts during the field test experienced difficulties and immediately requested assistance. Others operated under the assumption that their problems were minimal until they became too great to handle. Problem recognition implied process and substantive knowledge, a background that many coordinators lacked. Future coordinators may not recognize their difficulty or be unwilling to take steps to request assistance. Lack of an EIC outreach program may mean that districts most in need of help may not receive it.

If districts do turn to the EICs for help, however, it can be a major source of assistance. Division of the field test districts into three groups shows this effectiveness very clearly. In the first group would be those districts not needing technical assistance. These would primarily be those districts where the T and E Coordinator was highly experienced or where significant outside assistance was available. This would include Berlin, Madison, Merchantville, Rockaway, and South Plainfield. In the second group would be those districts where there was little connection to the field test or where little headway was made. This would include Clearview, Gloucester City, Kingsway, New Brunswick, Parsippany-Troy, South Brunswick, and Spotswood. In the third group would be those districts where there was no prior experience, a need for assistance, and where good headway was made. This would include Elk, Middlesex and Woodbury.

Of the latter group, the EICs were active in all three, especially in Elk and Middlesex. Of the second category, the EICs were active in only Clearview, Kingsway, and Spotswood. Success in Kingsway, moreover, was precluded by external events. Thus, the evidence indicates that the EICs can play a major role in supporting district progress and that such intervention need not be critical- other factors may play a greater role. Given basic planning resources, and coordinators willing to invest effort in educational planning, the EICs can provide the necessary assistance.

To be effective, therefore, the EICs must not assume a passive, reactive posture. Rather, they must contact districts, ascertain their needs, and attempt to meet them. In this respect the field test was illuminating. It demonstrated the necessity of EIC outreach programs. At the same time the field test was an anomaly. It allocated a large amount of EIC resources to a small number of districts- a condition that will not be likely to occur in the coming years. Even then, some districts did not use the EIC at all. When full scale implementation begins, distribution of EIC resources will have an important effect upon the ability of districts to plan properly. Coupled with an outreach program, therefore, would be a program to screen districts. In this way they could be sorted and treated according to the available technical assistance resources.

To some extent both EICs recognize the need for sorting. Tom Hamill and Paul Winkler perceived districts as falling within distinct categories whose members have to be approached differently. EIC-South sorted districts into rural, urban, suburban, and regional, and it developed special programs for each group. EIC-Northwest sorted them into groups of districts not needing technical assistance, districts needing significant help but organizationally able to utilize it, and districts where comprehensive training is needed. How EIC resources are to be allocated is a policy matter, but the field test established beyond a doubt that some division will be called for. They cannot help but be insufficient to meet real need.

Following from the need for an outreach program is the problem of EIC/county relations. If the EICs are to act as technical advisors in those districts where problems are experienced, they must have reliable and up-to-date information as to district progress. Ordinarily this would be the function of the county office. However, if some counties did not monitor properly and if others limited EIC access to their districts, this would undoubtedly affect statewide planning performance. If the EICs do not conduct active outreach programs, many districts may not receive the help they need. If they do conduct these programs, there is a likelihood of friction between some counties and the EICs.

Probably, the difficulty reduces to the administrative division of labor established in the planning system. Monitoring is by far a more limited function than technical assistance and may go against the grain of county staff with helping teacher backgrounds. Entrance of the EIC into a district may create territory problems and mutual distrust. Wherever it occurs it can only hamper the effectiveness of the planning operation.

Overall, however, the EICs worked well with the counties and demonstrated an ability to provide needed services. This portion of the field test was successfully completed.

Recommendations

1. The field test should be continued. Because the latter three planning stages were not field tested, the ten goal development pilots should perform this role. They should advance into the next stage, one year at a time, staying a stage ahead of districts statewide and providing meaningful operational information to those districts. Operational responsibility for this continued field test should be vested at the state level.

2. Planning guidelines should be rewritten and expanded. Especially in the needs assessment and program improvement stages, planning guidelines should detail specific planning activities and provide concrete examples of the procedures to be employed. These revised guidelines should be subjected to rigorous examination in the expanded field test.

3. Considerable effort should be made to insure that the goal development stage is made integral to the entire planning effort. Procedures should be developed to link the three phases of goal development, to insure community participation at each phase, and to assure that later planning stages are directly connected to the goal development stage.

4. County personnel should be trained in planning monitoring. Intensive training sessions should be held for all members of county staff for the purpose of explaining their role to them and to detail what will be expected of them in their monitoring roles.

5. All EIC s should begin an immediate district outreach program. EICs should be held responsible for contacting each district in their region at least monthly and for keeping detailed records of these contacts.

6. SDOE personnel should periodically visit districts in the process of educational planning to familiarize themselves with field problems and to evaluate County and EIC efforts.

APPENDIX

A Handbook for Goal Development at the District Level

This appendix is intended to be a source of suggestions for local T and E Coordinators faced with the prospect of deciding how best to approach the goal development task. Material included here comes from procedures used by field test goal development coordinators and, thanks to their considerable effort, this material is available.

From the T and E Coordinators' perspective, goal development models should be broken down into three main areas of responsibility: 1) Readiness of Community and Staff; 2) Recruitment of Participants; and 3) Running the Goal Setting Sessions. Different activities, of course, were conducted during each of these phases, but all of the three R's have a common denominator. That is, careful thought and planning were essential throughout the goal development process.

Readiness refers to the process whereby staff, students and district residents are introduced to the concept of goal development. How goal development fits into T and E and comprehensive educational planning should first be explained here. The EIC's have prepared a "T and E overview" presentation available to all districts. The package consists mainly of flow charts printed on overhead transparencies with an accompanying text. This presentation appeared to serve as a good starting point, but it was not a sufficient introduction. For a readiness campaign must also include a detailed explanation of how the goal model setting model being used works. And to go even one step further, all possible goal statements should be presented and discussed at this time so that audiences have a more concrete notion of what the substance of goal setting is all about.

Various forums from which to mount a readiness campaign were available to school districts. Explanatory articles can be placed in daily and weekly newspapers that circulate in the area, or in district/school publications. Such publicity should be frequent and include personal contact. Thus, teachers, administrators, students, school board members, and community groups should all be approached prior to actual sessions. It is best to keep initial sessions as small as possible, and to avoid intimidation, use of terms likely to be understood only by educators, unnecessary conflict. T and E Coordinators can expect a certain amount of hostility at these meetings and should be prepared to handle it. Questions should still be encouraged, and audiences should be urged to express their reservations and fears.

Of course, there must be someone present at each meeting who is qualified to answer questions that are raised, for in addition to providing basic information, the sessions should be aimed at convincing everyone as to the competence of the T and E directors and their sincere commitment to gather input from a variety of sources. An effective technique for accomplishing this originated in Rockaway. There, all questions raised during the readiness sessions were answered on the spot, and each was followed up with a personal letter to the individual questioner. All questions were then shared with other groups at different readiness meetings. This extra personal touch demonstrated the district's concern for individual points of view, and it served to build the basis for an effective communications network.

A successful readiness effort depended on flexibility and consistency. The same information should be made available to all groups, but the presentations must be geared to the make-up of the audience. Another key ingredient of readiness was thoroughness. The rule, "Don't assume anything!" seemed to be the best guide. The time it will take to complete a readiness campaign varied from district to district, depending mostly on the LEA's size and the level of expertise of its staff. Enough time to reach all relevant groups should be allowed, but not so much that the staff and community lose interest while waiting for the activity to start, or the actual goal setting must be crammed into the last few weeks of the school year. Districts should estimate that it will take anywhere from one to two months to orient the community and staff to the goal setting mission.

Recruitment is the logical extension of the readiness drive. A measure of how well the readiness effort was executed will be the ease with which districts can recruit members of the professional staff and the lay community for the actual goal setting exercises. For if goal setting is described as a rewarding, manageable, and important endeavor, recruiting participants should not be especially difficult.

In recruitment we are actually speaking about three different processes. For recruitment, like readiness, was aimed at three separate groups--students, instructional staff, and the general community. And just as the orientation to T and E must be handled a bit differently for each group, so must the recruitment approach be altered.

Participation by students was by far the easiest to arrange. Many LEA's that piloted goal setting involved students in the process, and the T and E Coordinators reported that this aspect of the experiment was a success. In fact, in some places the students received high praise for their helpful comments and for completing their task with the least amount of difficulty.

In each district the students were chosen by the chief administrator in each school. The primary criterion for selection was not necessarily an outstanding scholastic record, although several coordinators acknowledged that students with behavioral problems were not invited. Students who would not be afraid to speak their minds were generally sought. Additionally, a racial mix, where possible, was aimed for.

The number of pupils participating ranged from a low of two in Woodbury to a high of 40 in Gloucester, with most LEA's involving from 10-15 students. One question that persists is the age at which children are able to understand and therefore participate in the goal setting process. During the field test, most students were middle and high school age. But Berlin and Elk, both elementary districts, chose 4th, 5th, and 6th graders. T and E supervisors in those LEA's said they had no problem at all working with younger children. (Interestingly, neither of these districts used PDK, but more difficult open-ended models). The bottom age for student participation should, of course, ultimately depend upon the individual children in question. Some pilot districts also called upon recent high school graduates for their input, while K-8 Rockaway and K-6 Berlin involved former students who were then enrolled in high schools outside the districts.

Transforming reluctant teachers and administrators into willing participants took patience, persistence and luck. Every district is bound to have a few volunteers, and these people should be encouraged to generate enthusiasm among their colleagues. Superintendents have the option of making the teachers' involvement in goal setting a mandatory, in-service day activity. But most pilot districts preferred to stick with volunteers at the start.

Districts recognized that there was more than one way to involve staff members in goal setting. The degree of flexibility achieved depended largely upon the overall organizational structure adopted to manage the goal development project. One arrangement that allowed for flexibility and also involved a relatively greater number of people in the process began with the formation of a district-wide steering committee. (The interchangeability of terms used by the pilot participants may produce some confusion here. This district-wide group has been called both a steering committee and a district task force. The name is irrelevant; the point to remember is that this is a body distinct from the actual goal setting group).

The basic function of a steering committee was threefold: 1) to assit the district's T and E Coordinator(s) with the physical, routine duties of goal setting, such as securing meeting facilities, making signs, etc; 2) to serve as communicators, publicizers, and information-givers, and to build interest and enthusiasm among their friends, neighbors and colleagues; and 3) to operate as a liaison body between the entire staff, student body, and community and the superintendent and T and E Coordinator(s). As such, steering committees were particularly useful for larger districts where the coordinators' responsibilities were more extensive, and the need for an effective communications system was so much greater.

Steering committees should be kept small to insure that the group is not too unwieldy to perform its role. Membership could include the T and E Coordinators, administrators from schools in the district, several teachers, one or two students, school board members, and active community residents. All members must share two qualities--they must be willing to serve, and they must be

respected by their peers. Ideally, the committee members will all be volunteers, but where this is not possible, the coordinator should directly seek the involvement of persons he thinks are important to the success of the committee.

Teachers' support was, of course, crucial to the entire T and E effort. Some T and E Coordinators asked the district's teachers' association to recommend teachers for the committee. But the coordinators made it clear that teachers should be mixed by grade level (especially, in K-12 LEA's, a blend of elementary and secondary teachers), subject matter, school location, and seniority. Where possible, the promise of release-time was used as an incentive for teachers to join the committee.

Inclusion of school board members may demonstrate to the community and to the professional staff that the entire board thinks goal setting is important enough to warrant a member's direct involvement. Secondly, through that member's active participation, the board will come to understand better the mechanisms of goal development and of educational planning in general. And thirdly, that understanding should translate into even greater support for the district's efforts as the board comes to appreciate the difficulties of implementing T and E.

Community representatives are definitely needed to serve on the steering committee. The community members should be knowledgeable, active in school affairs, and well thought of by both teachers and parents. Such individuals would most likely be found in the PTA or similar school and civic organizations.

Finally, in districts that have high schools, one or two students may be placed on the steering committee. The students' presence will be valuable to other members for learning student perspectives. Bonafide pupil involvement in this decision making capacity might also help to reduce the student alienation reported by many coordinators and foster mutual understanding and respect between students and teachers/community members.

The steering committee, then, constituted a practical vehicle through which teachers and administrators could be drawn into the goal development process from the start. And it was a method of involvement where the need was real and the potential contributions substantial. If the committee did its job well, the professional staff would be better informed about T and E and more willing to assume a greater chunk of the T and E responsibilities. If the committee did its job extremely well, that same committee could continue its operation through the remaining three stages of educational planning.

There were many ways to recruit community members for goal setting. The SDE, COE's and EIC's encouraged districts to involve a good cross-section of their residents in the process. And all of the pilot T and E Coordinators held this as their aim when they began their recruitment efforts. During the pilot project, however, the COE's judged districts not according to how many people eventually turned out, but according to how much effort was made. For it was inevitable that some recruitment devices would prove to be more successful than others.

One fact emerged loud and clear from the field test: districts could not rely solely upon invitations to a random sample of residents and expect to end up with a broad-based community goal setting committee. Rather, it is a combination or random sampling, hand-picking of individuals, letters to community groups and parents, and an open invitation to the entire community that seemed to produce the best results.

Supporting evidence for the above conclusion abounded–for example, Donlin and Conover in Spotswood, Sykes and Herbert in Gloucester, and Sodotti and Campbell in Middlesex. In 1974, during goal setting, Donlin and Conover attempted to conduct a thoroughly random selection process.

Seventy names were chosen from a residency list and Donlin sent each what he described as a "folksy, warm and non-threatening" letter. They had hoped (unrealistically, they now realize) to receive 60 positive responses, but when only 13 were returned (and only nine people showed up at the first meeting), they tried a different tack. This time they sent letters home to every parent and printed an open invitation in the local newspaper. Through these methods they finished with a 61 member citizens goal setting committee.

Campbell and Sodotti's luck was a little bit better. The coordinators wanted a goal setting committee of 200. They first sent letters to a random sample of registered voters, with the intent of getting at least a 50% affirmative response rate. When this attempt produced only a minimal return, another 300 letters were mailed. Civic, social and service organizations in the borough, including the PTA and senior citizens' groups, received 100 invitations. Finally, the coordinators asked specific individuals to serve, including school board members, industry representatives and political leaders. These efforts produced a citizens goal committee of 145 (76 of whom were randomly selected) which the coordinators called "reasonably well-balanced."

Gloucester's experience demonstrated that even where less of an emphasis is placed upon obtaining a random sample, it is still difficult to form a broad-based goal setting committee. The district instituted a "key communicator system" of 100 "people who met people." These citizens had immediate access to the superintendent's office via a telephone hotline, and their mission was to pass the word about T and E around town. Numerous civic, religious, and social groups were requested to send two volunteers apiece to the goal setting session. Fifteen-hundred senior citizens and 600 pre-school parents also received letters, as did a random sample of parents with children in each grade in each school. Finally, an open invitation to all residents appeared in the city's newspaper. All of these efforts yielded only 28 affirmative responses, with 26 people actually coming to the goal ranking meeting.

Involving the community's "average" and minority group members is, of course, more difficult. The best approach here seemed to be working through community organizations and leaders of the ethnic and racial blocs than comprised the community. Also, it appeared that appeals to parents with children in the public schools yielded better results than working strictly through voter registration or district residency lists. Finally, it was a good idea to include stamped, addressed response cards with every invitation that was mailed.

One approach tried three times during the pilot project but not yet mentioned here is the community goal validation survey. In slightly different forms, goal surveys were sent to samples of residents in Spotswood, Madison and Woodbury. EIC-NW recommended the procedure for Madison and Spotswood, and it failed miserably in both LEA's. The questionnaire mailed in both places asked residents to prioritize the list of goal statements and then to rate their schools' performance on each goal. But the survey form was anything but inviting. It was far too long and terribly confusing. Donlin even received several calls from irate citizens who were convinced that the educators were trying to humiliate them by sending a survey they couldn't possibly comprehend. Needless to say, both districts had a response rate that was, in Donlin's words, "disastrously disappointing." Summing up the survey experience, the superintendent called it a "good concept whose implementation was a fiasco."

Woodbury improved on the implementation of the survey technique. Their questionnaire was quite simple and only two pages long. It was sent to 3,500 households plus all teachers and a random sample of 9-12 graders. Still, including staff and students, only 8% of the surveys were completed and returned (with only 5% of the community sample responding).

When one considers the extraordinary amount of time and money that must be spent on writing, producing and mailing the goal validation surveys, and on tabulating the results that do come in, it is apparent that this community involvement technique is far too costly for most districts

to use. The approach was tried in three very different types of school districts--affluent, suburban Madison; blue collar, suburban Spotswood; and urban Woodbury, with a high percentage of minority residents--and the results were uniformly disappointing. In Woodbury, superintendent Arrington commented that despite the admittedly low response, one benefit of the survey was that "the whole town" was talking about the goals and the schools even if just a few of the people bothered to return the form. Agreed that one of the benefits of T and E in general is that people will be thinking and arguing a lot about education. But a better way to accomplish that end would seem to be to make as strong a recruitment push as possible, and then to publicize the outcome of the goal setting exercise in the local newspaper, send notices home with all pupils, or perhaps even direct energies into developing a school newsletter for parents and other district residents.

Readiness and recruitment were, of course, done in anticipation of the last of three R's--running the goal setting sessions. As with the first two steps, a great deal of preparation and forethought must be taken to insure a final success. The actual goal setting meetings take only a few hours time, but it was here that "the little things" make a big and lasting difference.

T and E Coordinators should enlist as much help as possible to plan and run the sessions. In districts that have formed steering committees, that assistance will be readily available. In Gloucester, for example, the committee was responsible for physically setting up the meeting facilities and helping Herbert run the meetings by answering questions, giving directions, etc. The committee also went through the goal selection process ahead of time in order to get a feel for it. In Middlesex, where no steering committee existed, Campbell and Sodotti relied on their secretarial staff to handle many details, and the coordinators were convinced that these women came to know as much or more about goal setting than they did. The more people who are knowledgeable about the process, the more smoothly the sessions will proceed.

Participants should know exactly what is expected of them. Directions must be clear, concise and explicit--and preferably given in advance. It was a good idea to provide the participants with explanatory materials at least one week prior to the meeting date. This gave them an opportunity to familiarize themselves with the task that lay ahead. If this could not be done in advance, all participants should at least be given an explanatory package, a meeting agenda at the meeting, as was done in Middlesex. There, each participant was also handed a name tag and room number assignment to facilitate organization.

Several preliminary decisions pertaining to the organization of the goal setting meetings had to be made by the T and E Coordinators. The first of these was simple--when the meetings were held. All districts but one invited the community to an evening session. Gloucester chose a Saturday morning time on the assumption that people would be too tired to come on a weeknight after work. The field test produced no evidence that one time is any better than another for attracting more citizens, but districts might experiment with different times to see if that is a contributing factor to community turnout.

Another, more complicated decision related to the composition of each group that will go through the goal ranking process together. Most districts divided participants into small groups to permit greater discussion. But there are differing viewpoints as to whether the groups should be "pure" (i.e. all teachers, all students, etc.) or whether they should be mixed. The major advantage of keeping the groups separate, according to Rockaway's Gus Perna, is so that certain people would not be intimidated by others (i.e. students by parents; parent by teachers, etc.). But the disadvantage is that people would not enjoy the benefit of hearing opinions from a variety of sources. Districts that worked with mixed groups did not report any incidents of such intimidation.

If the entire teaching staff of a large district is going to participate in goal setting, then it would probably be wise to do this exercise during a regularly scheduled in-service day. Teachers' groups should be mixed by grade level and subject matter. If goals are to be applicable from

kindergarten through high school, teachers at all levels must have the opportunity to exchange ideas and information with each other. Indeed, as Ernest Barlow suggests, this staff interaction can be one of goal setting's principal benefits.

In the final analysis, the ease with which groups executed their goal setting tasks depended less upon their identities of the group members than upon the quality of leadership the district was able to provide during the goal setting sessions. In all districts the meetings were formally led by the T and E Coordinator(s) and, in some cases, an EIC representative. (Merchantville was also assisted by an educational consultant from Glassboro State College). The coordinators generally began the meetings by welcoming the participants, and then moved on to explaining their tasks and answering questions. The EIC staffs also gave directions, answered questions, tabulated the results, and generally lent an air of legitimacy to the project while providing moral and technical support for the coordinators. But it is very doubtful, once T and E is implemented on a broader scale, that the EIC's will be able to provide on-the-spot assistance at goal setting meetings. So it will be up to districts, working with the EIC's to train their own staff members or community volunteers to assume leadership roles during the goal setting exercises.

The word most frequently offered to describe the proper function of a group leader in this situation was "facilitator." This is meant to point out that a leader should not dictate the direction of the group; rather, he or she should guide it along its task. Group facilitators must, first of all, be knowledgeable about the task at hand. But beyond that, they must be sensitive to the participants' needs and watchful of the groups' dynamics. They need to serve as confidence boosters for the less articualte participants. And above all, they need to know when to interject and when to sit back and listen.

Individuals, however, cannot be counted on to "know," instinctively, how to handle such responsibilities. Instead, training programs must be developed in cooperation with district representatives, to prepare leaders for the role they must assume. Where possible, districts might choose to train enough people to supply each group with its own leader. How this might be done is an open question.

Another key decision that was affecting the management and organization of the goal setting meeting was whether or not LEA's with more than one school would hold separate sessions at each building. Woodbury got an idea of the goal preferences at each of its schools by tabulating the results of its goal validation survey by separate schools. Spotswood broke down the results of its goal assessment exercise according to the schools with which the respondents were affilitated. But South Plainfield was the only pilot district to conduct individual goal setting exercises at each of its schools. All sessions were held at the same time so that goal setting would be the big event throughout South Plainfield that evening. Maggie Steele gives two reasons for her decision to hold the separate sessions.

In the first place, she thought that there should be "a common thread of materials and objectives running through all the schools"–but that's all. Each school had a different clientele that needed and wanted different things. So by setting goals in all the schools, Steele was able to implant the "common thread;" and by allowing the schools to go through the process separately, she was also able to satisfy their individual desires. Secondly, Steele explained that holding a goal setting meeting in each different school was the best way she knew to involve more people in the process. While the field test did not produce enough evidence to confirm or deny the proposition, it is perfectly plausible to argue that parents, especially in large LEA's, would be more likely to turn out for an activity that directly affected their children, than for a district-wide activity whose relevancy might not be so apparent. Teachers too, might participate more enthusiastically if goal setting were brought down to the school level, for a certain pride of collective accomplishment might emerge among individual school teaching staffs.

Finally, people should be on hand to tabulate the results of the goal setting exercise that same evening. Pilot coordinators report that the participants are reluctant to leave without

knowing the outcome. While most participants apparently don't mind waiting, the tabulation should, of course, be done as quickly as possible. Refreshments might be provided at this point to ease the waiting period. After the results are announced they should be distributed to the entire community via local newspapers, school newsletters and notes to parents. Some districts sent a personal thank you note to each participant.

The multi-colored guidelines define "goal indicators" as "statements of conditions that would exist were the goal being attained..." They are specific measurable criteria that explicate broader goal statements. Goal indicators provide the focus for testing during the needs assessment phase of T and E.

Like the goals themselves, the indicators can be developed in a "top down" or "bottom up" manner. South Plainfield opted for a modified "top down" approach. Steele obtained a list of sample indicators from EIC and had the district task force rewrite some of them. Goal indicators, says Steele, are how goals become "personalized." The community council critiques the task force's work, and the entire staff has a final say before the indicators are adopted.

Ernest Barlow of Merchantville says that when teachers develop goal indicators they have to "think about the kid." Improving on Merchantville's goal setting experience, he chose to go with an open-ended approach for goal indicators. EIC and COE representatives spent ½ day training the staff in brainstorming and consensus taking techniques--preparation that Barlow calls both "helpful and necessary." He also found that combining outgoing and more reserved teachers in the same group worked to promote maximum participation by all staff members. Although the indicators were written solely by the professional staff, all groups that were involved in the goal ranking exercise had the opportunity to validate the indicators.

Rockaway's goal setting method was completely open-ended and therefore almost opposite of PDK. The package, called the "Community Expectations Goal Setting Model," was developed by American Telephone and Telegraph. Superintendent Perna chose the model because it required active community involvement and because AT&T was willing to conduct leadership training sessions.

James Esposito, the district's curriculum coordinator, spent three full days in training to run the project--one day with Pat Bailey, the AT&T representative, and another two days in Audubon, a school district that was holding training sessions for the same model. Esposito, in turn trained two reading teachers to assist him in the training of administrators, teachers, students and community members who assumed group leadership posts.

The actual goal setting discussion revolved around the following statement: "In order to make it in life, a person should be able to..." The volunteer committee met twice and worked in small separate groups of community members, students, teachers and administrators. The steering committee sifted through all the responses and reduced them to a list of 12 goals and 171 indicators. Each participant was sent a final draft of the goals, a form to register his or her approval or disapproval of the editing job for each goal, and a form to evaluate the goal setting sessions themselves.

This AT&T model has much to recommend it. The discussion question is basic enough for everyone to understand, yet challenging enough to prompt serious thought and dialogue. The excellent package of leadership training materials is added insurance that the goal setting sessions will be orderly and productive. And, although the AT&T process may seem very time consuming, it is actually shorter than PDK because goal indicators are formulated right along with the goal statements. Because the participants develop their goals from scratch they have a much clearer idea of what the goal statements really mean. They are then able to list specific behaviors that should occur if the goals are being met.

If the AT&T model has any flaw it is that–at least as it was executed in Rockaway–the product can be unwiedly. In addition to 12 goals and 171 indicators, the process generated 2,137 "sub-goal indicators and skill statements." Surely this is an unmanageable number of behaviors to test or even comprehend. More careful editing should resolve this problem. At any rate, the AT&T model has its advantages–certainly in its provisions for active community involvement.

EIC-S describes its own goal setting model as "eclectic" because it borrows a bit from several different approaches. It combines open and close-ended techniques and seems to blend just the right amounts of structure and flexibility into the process.

EIC-S has put together a booklet that gives a step-by-step explanation of its goal development model. The district coordinator and the steering committee begin the process by selecting 50 tentative goals for the goal setting committee to consider. EIC has compiled a list of 53 such goals researched from various sources that districts can use for this purpose. (The list is included in the booklet). Through repeated discussion, reflection and revision, the committee eliminated over half of the original list to end up with a set of 15-20 prioritized goal statements.

Once the district possesses its list of goals, the EIC-S model instructs the district on how to develop indicators and assessment objectives for those goals. EIC-S acknowledged that this activity is usually carried out by a group of professional staff members, but it suggested that districts consider involving a wider spectrum of the educational community. Specifically, EIC recommended that since all staff members will be affected by the indicators and assessment objectives that are eventually adopted, the entire staff should be given the opportunity to review and react to the committee's work. Students and community residents might also be asked for their input at this point.

As for how the process actually works, EIC advised that the participants first be taught brainstorming and consensus taking techniques in order to facilitate group decision making. The EIC booklet then notes that it is best to work on indicators and objectives by relating the general goal statements to specific subject matters and then writing objectives and indicators for the goals as they would pertain only to certain subjects. EIC's basic approach to this last phase of goal development is reflected in its simple definition of goal indicators as "what our students should be able to know, do or feel when a goal is being met." Assessment objectives–often a cause of confusion--are also explained simply as "goal indicators with standards of performance and time added."

This eclectic goal setting model has several positive features. For one thing, it was obviously developed with great care by the staff at EIC-S. The entire process flowed smoothly from one step to the next, and it all led directly and sensibly to the needs assessment phase of T & E. Each successive step in the goal development model built on the lessons of the last. Furthermore, the model was structured in such a way that the participants were constantly forced to consider the goals within the context of a real educational setting. Through indepth discussions and contant reappraisal of their work, users of this approach should find that they are far more aware of what they expect from their schools and far more understanding of how those aims can be realized through the actual instructional process than they were before.

Elk Township field tested the EIC-S model. Jim Davis, the LEA's administrative principal, was very pleased with the design and the assistance that he received from the Center to implement it. Goal setting was done in mixed, small groups and Davis says that the origianl goals were really "picked apart" by everyone.

Woodbury used a modified EIC-S model. The plan contains some good ideas, but it should be recognized that the full benefits of those ideas were not realized due to implementation difficulties. Woodbury's goal setting process began with the formation of a 23-member volunteer steering committee.

Teachers, principals, students, board members and district presidents served on this committee, though it actually functioned as two committees with the staff and students doing most of their work after school and the community members working at night.

The steering committee, along with Barry and Arrington, set the goal setting process in motion. Using the state's Our Schools goals for guidance, they identified 12 basic goal areas and wrote one goal statement for each. A great deal of time was spent modifying and refining the original goal statements, particularly by the community members who insisted that the goals be freed of educational jargon. After all of this discussion, the district had a list of goals that, in coordinator Barry's phrase, really "fit" Woodbury.

The next step in the goal development process was an open board of education meeting at which the goals would be explained to the community, discussed, and hopefully adopted by the board. But the widespread community participation that was supposed to occur at this point never materialized because of poor planning. The district banked on getting a large community turn-out through one announcement printed in the city newspaper. But Barry says that his lengthy explanatory article was cut by the newspaper to a one inch notice of date, time and place. Only six people showed up at the meeting, though the discussion ensued anyway and the board did approve the goals. This experience, of course, underscores the need for districts to try several community recruitment approaches at once.

The final phase of Woodbury's goal development exercise--the community goal validation survey--has already been mentioned. The low rate of return for the questionnaire, coupled with the poor turnout at the school board meeting, meant that community input into goal setting was essentially limited to the 12 community members of the steering committee. Woodbury's residents were informed of the results of the goal setting procedure through a district newsletter, but ex-post-facto notification is surely no substitute for active community participation.

Still, Woodbury should be commended for attempting on original goal development process. The model begins quite well with the steering committee actually writing its own goal statements. This part of the process permits much thought, interaction and discussion. The idea of then expanding the group that participates in the discussion also has merit. Unfortunatley, this was not accomplished in Woodbury.

The district should also be commended for its progress in developing goal indicators--undoubtedly a reflection of its bottom-up approach to goal development. Five elementary and secondary teachers spent the summer after the pilot period developing goal indicators for all 12 goals. The teachers also wrote assessment objectives to go with the basic skills indicators for grades K-12. A highly readable form was designed on which the goal indicators or competencies, assessment objectives and sample measurements were written to complete a concise, comprehensible package.

Superintendent Arrington thinks that hiring the teachers to work during the summer months accomplished two good things. First, it was a way to get the job done in a less pressurized environment. And secondly, it improved staff attitudes and morale by making T and E seem like an educational improvement process requiring teacher input rather than strictly an administrative procedure.

Woodbury's goal indicators and assessment objectives, however, will not be validated by the larger community. Barry believes that the teachers' committee got so much input from other teachers while working on the indicators that further validation by the community would be superfluous. So the district is continuing its T and E process with virtually no community involvement.

Berlin's goal development process can not actually be called a "Model." It is, rather, a series of techniques that demonstrate exactly what goal development is all about.

From the start, Superintendent Caramannathought that goal setting would be a fairly simple task. He knew how he wanted to proceed, but he conferred with the Camden COE and SDE to determine whether the state had any "special" requirements. Anything discussed at these sessions was reported back to the staff and community during frequent meetings with teachers, the community council and eight students. At that point, the community council officially had 66 members, with an "average attendance" at each session of 33. New people, however, were invited to attend every meeting. During these meetings, it was decided that Berlin would pursue an open-ended approach to goal setting. Caramanna believes that's the only way people will develop a sense of "ownership" of their goals, and therefore a greater commitment to them. "Besides", says Caramanna, "people like to say what they think."

In keeping with the idea of using an open-ended method to allow people to say what's on their minds, Caramanna was determined to make the goal setting assignment as plain and straightforward as possible. He disliked fancy educational jargon because it was bound to create confusion. He insists that "people must experience the task first;" conceptual matters can be defined and discussed later. Caramanna advised that the best way to simplify the task is to bring it down to the classroom level. So, after practicing brainstorming techniques, the participants engaged in role playing exercises to insure that goal statements would always be related to a real school setting.

Teachers, community members and students worked separately in Berlin, though the techniques used with each group were similar. Caramanna acted as a facilitator at each session and led all discussion off with the same question: "How well do you think Berlin's schools were doing 10 years ago; 5 years ago; now?" The superintendent warns that the key to success is making sure that equal value is placed on everyone's comments. It helps to line the room with large sheets of paper and record comments immediately as they are made. Then at the end of the session everything that was said and accomplished can be reviewed.

When each group finished its work they met together to compare results. There were similarities in each group's list and no group was anxious to delete another's suggestions. They also decided that except for keeping basic skills as a top priority, ranking goals was unnecessary. Instead, they spent time talking about the implications of each goal for different grade levels, special groups of children, etc.

Goal indicators were developed in much the same manner. This time, to bring the task down to the classroom level, the role playing revolved around the question: "What evidence indicates to you--as a classroom teacher--that you are meeting this goal?" Caramanna reports that role playing was "less dramatic" with the community than with the staff, but that sessions with both groups were fun and productive.

It should be emphasized, of course, that there were few districts in which such a free-wheeling approach was attempted. It was, for one thing, very time consuming. Ten, two-hour sessions were required by each group to complete its assignment. That meant, of course, that the participants had a strong commitment to the task. Furthermore, a great deal of cooperation among all parties was needed for role playing to work.

But for a number of reasons, Berlin was a unique district. In the first place, T and E was not a foreign concept there. At least three years prior to the pilot Caramanna had begun to experiment with several forms of participatory planning. And in March, 1975, the superintendent led two residential week-end workshops on the subject.

Secondly, Caramanna enjoys a very close, trusting relationship with his staff. It is largely a function of how Caramanna treats the staff. He included them in the decision-making process and he is anxious to know what's on their minds.

Thirdly, the residents of Berlin enjoy a special relationship with their schools. "Community involvement" is not a new concept in Berlin; indeed, it is not just a concept at all. Community involvement in the district is a living, breathing reality and has been for many years. Parents accompany children and teachers on weekend outings and their opinions are solicited on a wide range of issues. For the residents of Berlin, the township's educational park is a focal point of community life.

Finally, the district is blessed with a "fanatical" superintendent who is willing to put in 15 hour days to maintain the harmony and find ways of improving education in Berlin.

But even if Berlin's qualities make it one of the few New Jersey districts in which the completely open-ended role playing method of goal development is viable, Berlin's experience contains valuable lessons for all LEA's. Caramanna, first of all, stressed the importance of the planning that must be done prior to executing any steps. Preliminary planning discussions were held in the district with EIC and COE representatives before any action was taken to develop goal statements and again before they moved on to goal indicators. It was at these critical preliminary stages that overall strategies were mapped out and destinations set.

Caramanna's exphasis on planning was a suggestion for who should be involved in planning. Caramanna solicited advice from EIC, COE and SDE staffers and included parents, teachers and students in the decision making. Involving people right from the start with planning and decisions, he felt, was the surest way to insure their cooperation later on.

The last important lesson to be learned from Caramanna's approach to goal development was the wisdom of treating it in a straightforward manner. Relating the exercise to the actual classroom situation insures that the task will be understood by all participants and that the goals and indicators they develop will be meaningful and relevant. These lessons are surely applicable for all districts regardless of which goal development model they choose to follow.